

Guarantee types

September 11, 2026

Guarantee types

Guarantee types at a glance

Guarantee types are the reusable names maintained in the **Guarantee Types** reference list.

The list is part of the sales configuration area and shows saved guarantee-type names under the **Name** column.

Use this page when you need to review or maintain one of those names. From the configuration area, select **Guarantee Types**.

If you need to...	Go to...
Find a saved guarantee type	Find a guarantee type
Understand the list and its form	Understand the list and form
Create, edit, or delete a type	Create, edit, and delete a guarantee type
Use list settings	Handle permissions and list settings
Open a related sales reference list	Continue with related configuration

The screen also sits beside related configuration lists, including [Inquiry types](#), [Delivery terms](#), and [Payment methods](#).

Before you start

Before maintaining a guarantee type, make sure you have access to the requested-guarantee configuration area and the **Name** value you want to review or enter. The **Name** field is required in the form.

Your access determines which actions appear.

Your access allows you to...	Available control
Create a type	New
Edit a type	The row edit action
Delete a type	The row delete action
Export the list	Export
Import list data	Import

With access and the required **Name** value ready, find the list before reviewing or maintaining a type.

Find a guarantee type

A guarantee type appears as a row in the list, with its name in the **Name** column.

Prerequisites

- You know the name you want to review, or you are ready to create a new name.

Steps

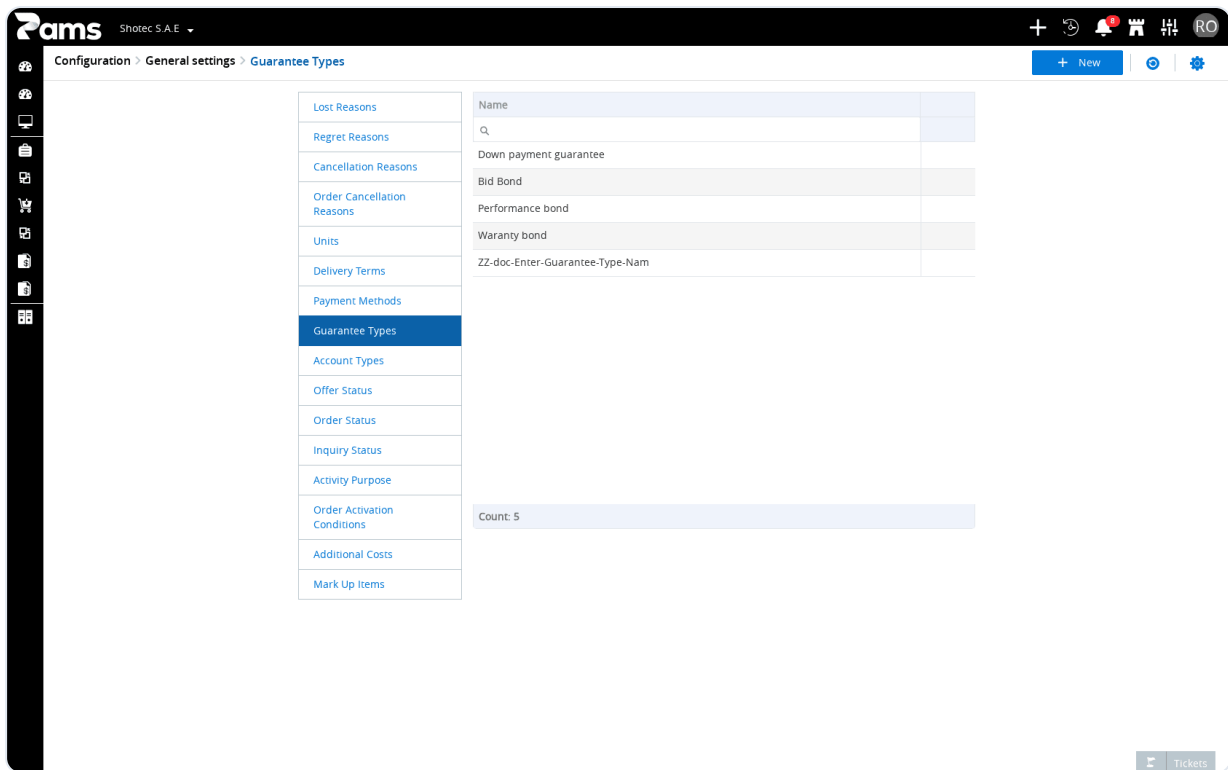
1. Select **Guarantee Types** in the configuration area.
2. Read the **Name** column to locate the saved guarantee type.
3. Select **Refresh** to reload the list when you need the latest list contents.
4. Select **New** when you need to add a guarantee type.

The screen initially displays **New**, **Refresh**, and **Settings**.

The refresh hint uses `Updated around a minute ago` when the last update was around one minute

earlier. At other intervals the exact message is `Updated` + minutes + `minutes ago` .

Result: The guarantee type is visible in the **Name** list, or the screen is ready for you to start a new entry.



Understand the list and form

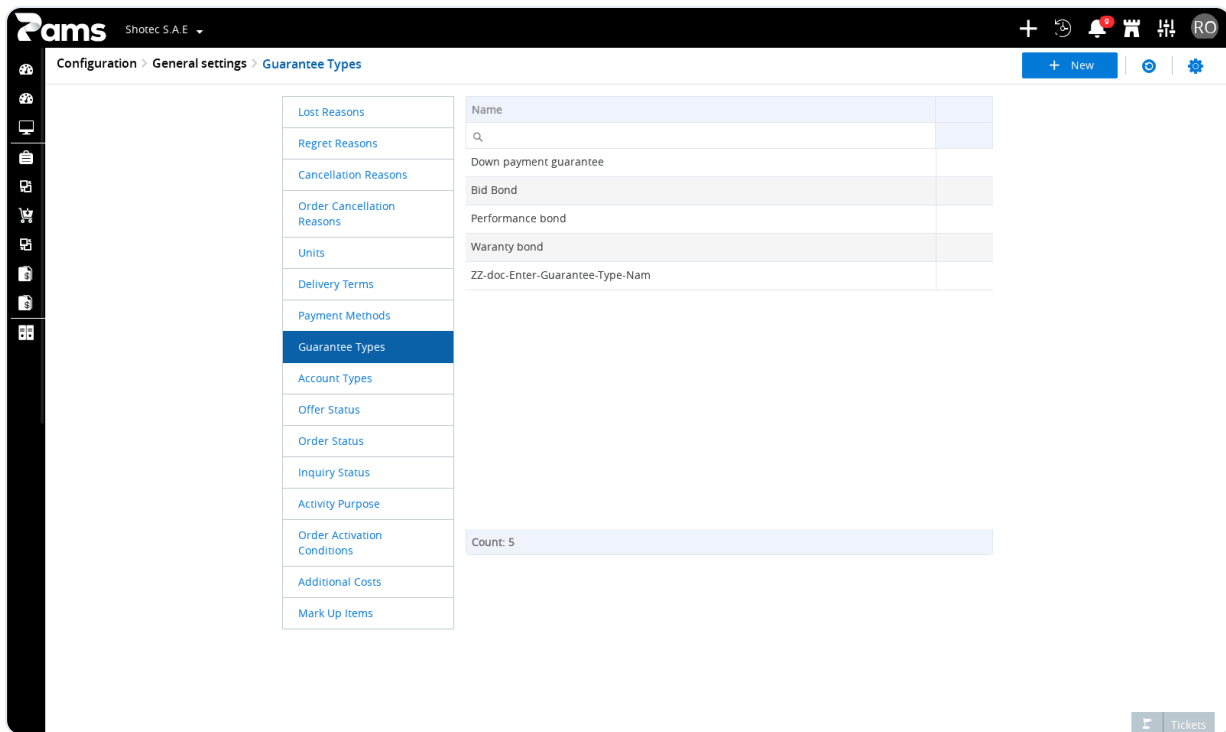
The list shows the **Name** column. Select a list row to review its value.

Area	What you use it for
Name column	Read the saved guarantee type name
Guarantee form field	Enter or change the name
Save	Save the form through the shared popup

The form appears after you open a type or select **New**. The **Name** form item carries the required marker.

The form uses **Guarantee** for the type name.

After reviewing the form details, choose the appropriate maintenance procedure.



Create, edit, and delete a guarantee type

Use **Name** when you create or edit a type.

Create a guarantee type

Prerequisites

- You have the permission that makes **New** available.
- You have the name to enter.

Steps

1. Select **New**.
2. Enter the type name in **Guarantee**.
3. Select **Save**.

After you select **New**, the form opens for a new guarantee type.

After a successful save, the application displays **Data saved Successfully**.

Result: The new guarantee type is added to the list.

Edit a guarantee type

Prerequisites

- You have access to edit guarantee types.
- The guarantee type appears in the **Name** list.

Steps

1. Select the guarantee type row in the **Name** column.
2. Enter the new value in **Guarantee**.
3. Select **Save**.

The selected row opens in the form with its current name.

After a successful save, the application displays `Data saved Successfully`.

Result: The updated value appears in the **Name** list.

Delete a guarantee type

Prerequisites

- You have access to delete guarantee types.
- The type appears in the **Name** list.

Steps

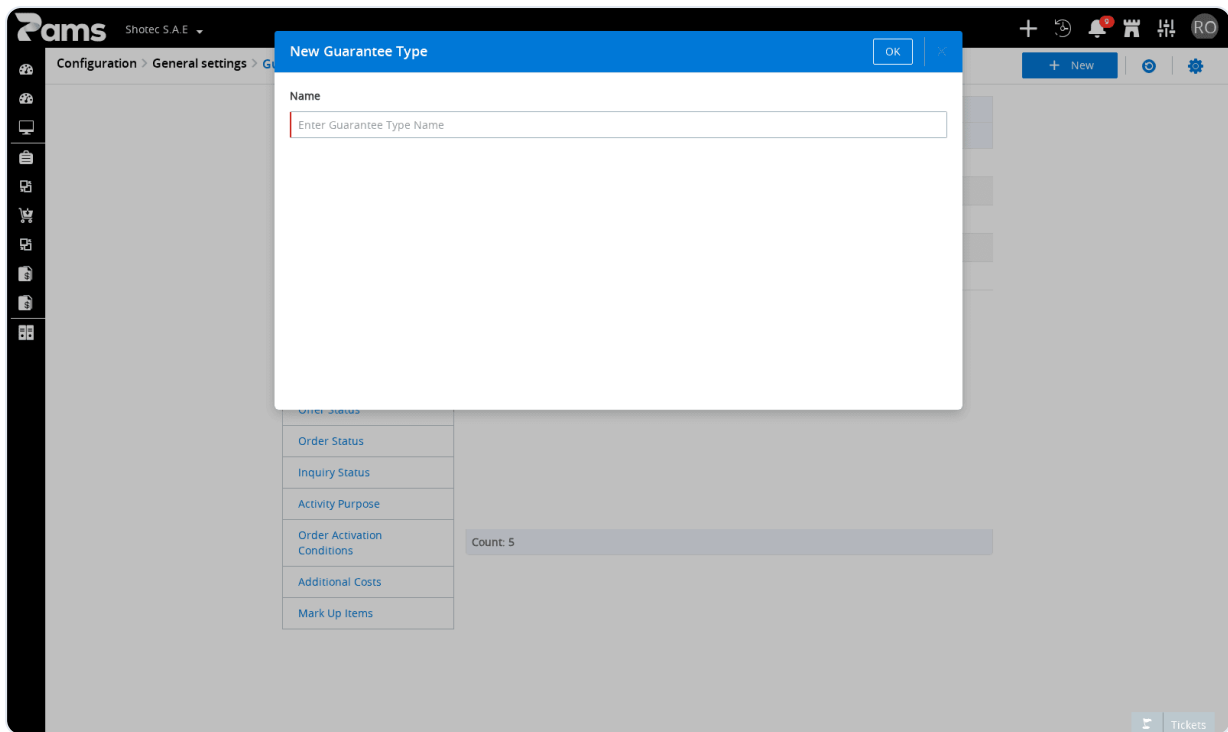
1. Select the icon-only delete action for the selected **Name** row.
2. Read `Are you sure you want to delete this item?`.
3. Choose the outcome that matches your task:

If you need to...	Select...
Remove the type	Delete
Keep the type	Cancel

After selecting **Delete**, the application displays `Data Deleted Successfully`. After selecting

Cancel, the delete menu closes.

Result: The type is removed from the **Name** list after **Delete**, or the list remains unchanged after **Cancel**.



After maintenance, use **Settings** when you need a list tool.

Handle permissions and list settings

The header tools change what you can do with the list. **Settings** opens the list tools.

The edit

and delete options appear when your access allows those actions.

Prerequisites

- You are on the Guarantee Types list.

Steps

1. Select **Settings**.
2. Choose the tool that matches your task:

If you need to...	Select...
Show or hide the filter row	Filter Row
Export the list	Export
Import list data	Import
Work with the list layout	Table Layout

Result: The list tool you selected is available for use, subject to your permissions.

If an action produces a message, match it in the troubleshooting table that follows.

When an action does not work

Use the message text to identify the point at which the action stopped.

What you see	What it means	What to do
Are you sure you want to delete this item?	A confirmation asks whether you want to delete the selected item.	Check the row, then select Delete or Cancel .
Data saved Successfully	The save path completed.	Return to the Name list and read the saved value.
Data Deleted Successfully	The delete path completed.	Confirm that the row no longer appears.
Updated around a minute ago	The refresh hint reports an update around one minute earlier.	Continue reviewing the list.
Updated followed by minutes and minutes ago	The refresh hint reports the elapsed minutes.	Continue reviewing the list.
Export to Excel or Export to PDF	An export format is selected.	Continue with the selected format.

Result: You can match the message or screen state to the next action without treating a confirmation prompt as a completed change.

When the list work is complete, continue with related configuration.

Continue with related configuration

The Guarantee Types screen is one list in the configuration area. The surrounding navigation contains these related reference lists:

Related configuration list
Lost Reasons
Regret Reasons
Cancellation Reasons
Order Cancellation Reasons
Units

Related configuration list
Delivery Terms
Payment Methods
Guarantee Types
Account Types
Offer Status
Order Status
Inquiry Status
Activity Purpose
Order Activation Conditions
Additional Costs
Mark Up Items

Continue with the page that matches the reference value you need to maintain:

- [Reference-list data](#) for the broader reference-data area.
- [Inquiry types](#) for inquiry-type values.
- [Delivery terms](#) for delivery-term values.
- [Payment methods](#) for payment-method values.
- [Finance letters of guarantees facilities](#) for the separate finance-side guarantee configuration.